

What is claimed is:

1. A method of managing workflow comprising:
receiving work at a first location;
determining identifying information associated with the work;
building a request based on a type of the work to be
completed;
at least partially completing the request; and
submitting the request for processing.
2. The method of claim 1 wherein the work is selected from
the set comprising: work received via mail, work received
via electronic data services, work received via telephone,
work received via facsimile, work received via overnight
mail, and work received via private courier.
3. The method of claim 1 wherein the work is received in
paper form.
4. The method of claim 3 further comprising imaging the
paper form of the work to create a digital representation of
the work.
5. The method of claim 4 further comprising associating the
identifying information with the digital representation of
the work.
6. The method of claim 4 further comprising placing the
digital representation of the work in a digital envelope.
7. The method of claim 1 wherein the step of identifying
client and contract information associated with the work is
performed manually.

8. The method of claim 7 further comprising assigning the step of determining identifying information to a worker.

9. The method of claim 1 wherein the step of determining identifying information associated with the work is performed automatically.

10. The method of claim 1 wherein the step of determining identifying information associated with the work is performed at a second location, the first location geographically removed from the second location.

11. The method of claim 1 wherein the step of determining identifying information associated with the work includes determining a client identifier.

12. The method of claim 1 wherein the step of determining identifying information associated with the work includes determining an account identifier.

13. The method of claim 1 wherein the step of determining identifying information associated with the work includes determining a client name and a contract identifier.

14. The method of claim 1 wherein the step of building a request is performed automatically.

15. The method of claim 1 wherein the step of building a request is performed manually.

16. The method of claim 15 further comprising assigning the step of building a request to an examiner.

17. The method of claim 1 wherein the step of building a request is performed at a second location, the second location geographically removed from the first location.

18. The method of claim 1 wherein the step of at least partially completing the request is performed automatically.

19. The method of claim 1 wherein the step of at least partially completing the request is performed manually.

20. The method of 19 further comprising assigning the step of at least partially completing the request to a client transaction technician.

21. The method of claim 1 wherein the step of at least partially completing the request is performed at a second location, the second location geographically removed from the first location.

22. The method of claim 19 wherein the step of at least partially completing the request is fully completing the request.

23. The method of claim 1 further comprising prioritizing the work received.

24. The method of claim 23 further comprising prioritizing the work received at least partially by a manner in which the work is received.

25. The method of claim 1 further comprising placing the work received into an identity queue.

26. The method of claim 1 further comprising placing the work identified into a queue.

27. The method of claim 1 further comprising placing the request into a queue.

28. The method of claim 1 further comprising checking the at least partially completed request.

29. The method of claim 1 further comprising assigning a skill level to the request based on the type of work to be completed.

30. The method of claim 29 assigning the step of at least partially completing the request to a worker based on the skill level.

31. The method of claim 1 further comprising monitoring the step of determining identifying information.

32. The method of claim 1 further comprising monitoring the step of building a request.

33. The method of claim 1 further comprising monitoring the step of at least partially completing the request.

34. The method of claim 1 further comprising prioritizing the building of the request based on the identifying information.

35. The method of claim 1 further comprising prioritizing the at least partially completing the request based at least in part on the type of the work.

36. The method of claim 1 further comprising prioritizing the submitting of the request for process based at least in part on the type of work.

37. The method of claim 1 wherein the work is financial services work.

38. The method of claim 1 wherein the work is pension plan work.

39. A method of managing workflow comprising:
imaging paper documents from clients at a first location to create digital images, the images expressing at least one client instruction;
manually examining the digital images to determine a subtype;
automatically associating a plurality of information fields required to complete processing of the at least one client instruction based on the subtype by creating a request;
manually completing the information fields of the request;
and
submitting the completed information fields for processing.

40. The method of claim 39 further comprising checking the step of manually completing the information fields of the request.

41. The method of claim 39 further comprising checking the step of manually examining the digital images to determine a subtype.

42. The method of claim 39 wherein the subtype is selected from a list of standardized processes.

43. A new method of processing correspondence from clients in a financial product administration system having the advantages of standardized workflows and balanced work loads, the method comprising:

receiving the client contact;

routing the client contact to a request examiner for evaluation;

selecting at least one of a list of standardized processes for the client;

creating a request based upon the selected standardized process;

placing the request in a working queue of current requests; and

assigning to an available worker one of the current requests based upon priority of the request and a skill level of the worker.

44. The method of claim 43 wherein the one of the current requests is assigned to the worker having the lowest skill level qualified for the request.

45. The method of claim 43 wherein the working queue of current requests is a queue for requests based on location.

46. The method of claim 43 further comprising the step of working the assigned request by the worker.

47. The method of claim 46 further comprising the step of completing the assigned request.

48. The method of claim 47 further comprising the step of storing the completed request in a database to await cycle processing.

49. The method of claim 48 wherein the completed request is routed to a quality control destination.

50. The method of claim 43 further comprising the step of capturing system information concerning the amount of work performed for different requests and skill levels.

51. The method of claim 43 further comprising the step of reporting the system information.

52. The method of claim 43 further comprising the step of assigning the customer correspondence an identification number for tracking the correspondence and associated one or more requests throughout the system.

53. A new method of processing correspondence from customers having the advantage of balancing and leveraging workforces from remote locations, the method comprising:
defining a plurality of standardized processes;
providing two or more workforces of workers in different locations;
providing a computer network connecting the two or more workforces;
providing a request examiner in at least one of the locations;

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defining a plurality of skill levels for the workers;
assigning each of the workers at least one of the skill
levels;
receiving the customer correspondence;
routing the customer correspondence to a request examiner in
one of the locations for evaluation;
selecting at least one of the standardized processes for the
customer correspondence;
creating a request based upon the selected standardized
process, the request being associated with one of the
skill levels;
storing the request in a working queue of current requests;
and
assigning to a next available worker in one or more of the
locations one of the current requests based upon
priority of the request and the skill level of the
worker.

54. The method of claim 54 wherein the one of the current requests is assigned to the worker having the lowest skill level qualified for the request.

55. The method of claim 54 wherein the request is assigned to the next available worker in any of the locations.